Performance
Quick Reference Guide - Employees

Using your Home page

Your Home page highlights everything you need to manage your own performance. Stay on top of your goals, development plans, tasks to complete, and feedback. Easily keep yourself on track by updating activities, completing tasks, preparing for performance conversations and sharing feedback - all from your personalized dashboard view.

Note: Use the Navigation Bar to go to the areas of the site. Using the browser's Back button could result in lost data.

Check the tasks area to see what you need to do. Tasks appear in order of due date and status.

- Click the tile to open the task.
- Click **Task Status** to view the status page.
- Hover over the Process icon to see the process title.
- Hover over the tasks to see navigation arrows to access additional tasks.
- Click **All Tasks** to see a comprehensive list of tasks.
- Look for a number on the card letting you know how many subtasks you have under that task.

Share feedback, notes, aricles, or links with managers and peers.

You can also send notes to yourself as reminders, or for future reference.

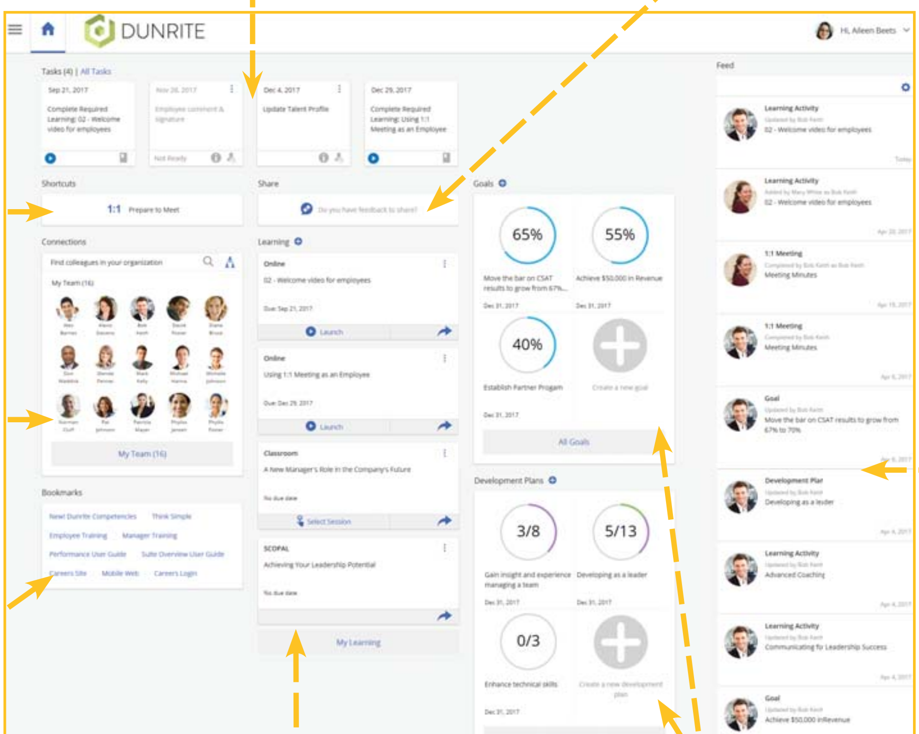
Click the **Main Menu** icon to access your My Performance, Task Status, Talent View, etc.

Use Shortcuts to get to key areas such as Prepare for 1:1, View Profiles, Search for Talent, etc.

Use Connections to view your team and search for colleagues.

You can also access Talent View, view profiles, and send feedback.

Use Bookmarks to access helpful online resources.



Click your **Profile** picture to view and update your profile, configure your settings, or to log out.

Keep your eye on the Feed for a continuous update of feedback, approvals, etc.

Click to configure the types of activities that will appear in your feed.

Use the Learning area for quick access to your learning activities. Activities will appear in order of due date.

- Click to access the learning catalog and add more activities.
- Click the tile to view the complete details.
- Click Launch to open the course directly.
- Click to copy the link to an activity and share it with someone via email.
- Click to view training location and schedule details.
- Click to access resources associated with that activity.
- Click **My Learning** to see a complete list of your learning activities.

Create or update goals and development plans right from the Home page.

Up to four items will be displayed (based on due date, then modified date). Click **All Goals** or **All Development Plans** to see additional items.

Performance
Quick Reference Guide - Employees

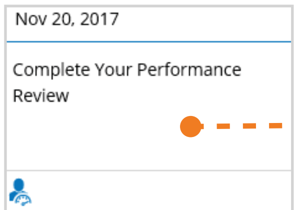
Working with tasks

Accessing your tasks

Your tasks appear at the top of the Home page in priority order. In addition, you may receive an email notification when you have a task to complete. Note: Emails could end up in your junk mail folder if you do not add permissions to your mail client. Contact your administrator if you need help.

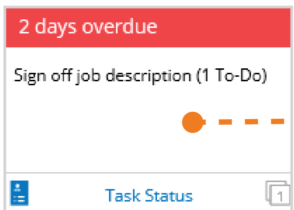
To open a task, click the **tile**.

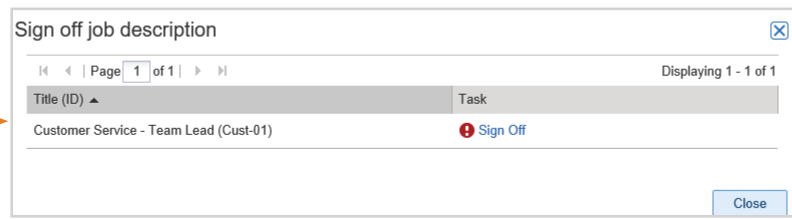
Either the form will open



or

the task window will open. From here, click the link under the Task column.





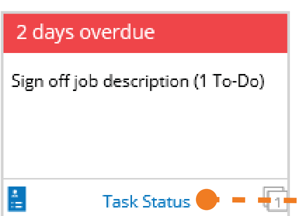
Refer to page 3 for information on working with a form.

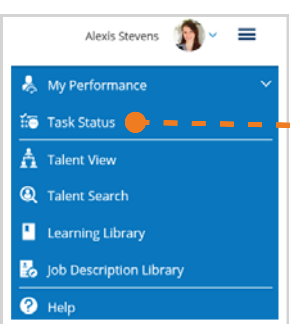
Once all tasks are complete, you can access your completed forms in the Past Evaluations section in My Performance.

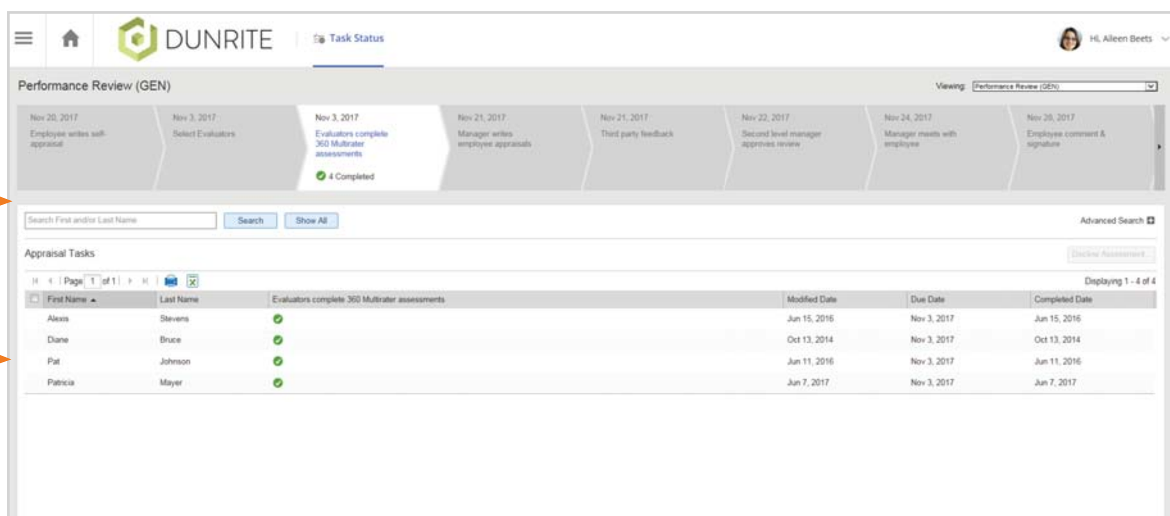
Viewing the Task Status Page

This page provides a task status overview and, depending on the process, it may include a link to complete a task.

From your Home page, click the **Task Status** link either within the task title or from the Main Menu.



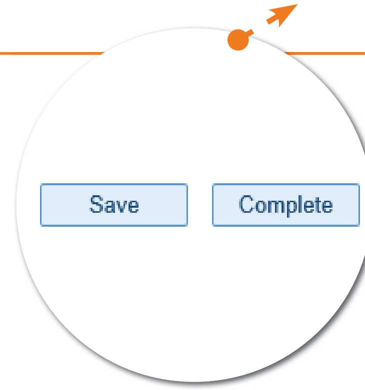




Performance
Quick Reference Guide - Employees

Working with a form

Some of the features available as you work with a form are described here. The icons are explained below.



Printing or Saving as PDF

Click the **Print** icon, and then choose either XPS printer, PDF generator, or regular print.

When printing a hard copy:

1. In the popup window, select **Normal Print** or **Condensed Print**.
2. To keep sections together on a page, deselect **Allow Sections to break across pages**.
3. Click **OK** when finished.

Check Spelling

Click the **Check Spelling** icon to check the entire form for spelling mistakes. Note: The Check Spelling icon also appears in sections within the form and allows you to check spelling for individual sections.

Check Language

The Check Language tool will flag words that may be offensive and offer suggestions for replacement words; such as replacing the word “lazy” with “unmotivated”.

Using the Split Screen

With your form open, use the split screen to view Employee Records such as goals, development plans, feedback, and past appraisals.

1. Click the **Split Screen** icon.
2. From the dropdown, select the item that you want to display. The split screen widow will open at the bottom of the form. Copy and paste information directly into the form, if desired.
3. Click the **X** to close the split screen.

Saving vs. Completing

Depending on your role and the current step in the workflow, the buttons at the top of the form may vary.

- Click **Save** if you want to save a draft and return later to add additional content.

  You are encouraged to save your work on a regular basis. If no activity has been detected for a certain period of time, the system will warn you of inactivity. You will get a message asking if you would like to continue working. If no action is taken when the message displays, you will be logged out and will lose any unsaved work.

- Click **Complete** only when you are finished the form and are ready to move to the next step in the process.

  Once you select Complete, you will no longer be able to edit the form without contacting your administrator.